



Fidelity and Quality Assurance Plan for Washington State Chronic Disease Self Management Education (CDSME) Programs



INTRODUCTION: Fidelity and Quality Assurance (QA) for the Chronic Disease Self Management Education (CDSME) Programs is an integral part of program sustainability in local communities. It is vital that participants experience a workshop delivered as the Stanford University curriculum developers intended, and as the research supports... If we hope to have 3rd party payers begin and then continue to include CDSMEs as subscriber benefits, we must be able to ensure and document fidelity activities and outcomes.

Stanford University Patient Education Research Center (PERC) has defined Fidelity as: “How closely staff and others (i.e. leaders, Trainers and evaluators) follow the program that the developers provide. This includes consistency of delivery as intended as well as program timing and costs.” PERC developed a Fidelity Manual and Fidelity Tool Kit which offers a comprehensive Fidelity and QA plan. This plan focuses on fidelity monitoring during leader training and fidelity monitoring when workshops are delivered. The Fidelity Toolkit and Manual are located at:

<http://patienteducation.stanford.edu/licensing/FidelityManual2012.pdf>

http://patienteducation.stanford.edu/licensing/Fidelity_ToolKit2010.pdf

Recommendations for Washington State CDSME Fidelity focus on the most essential aspects of the Stanford recommendations. Those “baseline,” non-negotiable requirements are:

- The program is standardized and MUST be taught as written in the Leaders Manual. This means:
 - Two trained leaders
 - Follow the script
 - No “guest” speakers or added material
 - 2.5 hours once a week for 6 weeks
- Organizations offering CDSMEs must have a current Stanford license for the program(s). The Stanford website houses license fee information as well as the application forms.

Objectives for Washington State Fidelity Plan:

1. Provide guidance and tools to organizations offering CDSMEs to assist in delivering a quality program for participants.
2. Provide guidance to assist in allocating personnel and resources for fidelity.
3. Provide tools for choosing and training leaders and Master Trainers.

Washington State Recommended Fidelity Practices:

Our recommendations are drawn from the experience of the Oregon Living Well Program, Group Health Cooperative, the Arizona Living Well Institute and the New York State QTAC. They have generously allowed us to adapt some of their fidelity materials.

Leader Training: Fidelity begins by training Leaders to deliver the workshops in the way Stanford designed. Therefore it is important that the Master Trainers providing the training correctly model the program and required facilitation skills. These training and facilitation skills are then replicated by the Leaders in workshops. We recommend Leader Training courses be observed for at least one half day of the 4-day training. Observation is done by a Master Trainer or very experienced Leader. Immediately after observation, the observer follows up with the Master Trainers and provides positive feedback and suggestions for possible improvement. We use the two documents “Leader Training Fidelity Checklist” and “Instructions for Observing Leader Training”. These checklists are available in Spanish as well.

Workshop Fidelity: Leaders learn about fidelity during their training and are provided with a Workshop Fidelity Checklist used during observation. A Master Trainer or experienced Leader observes the new Leaders during their first workshop series. It is important to emphasize to Leaders that program observation is done 1) to ensure that programs are offered as designed, and 2) to help Leaders see observation as an opportunity to improve programs and provide helpful feedback .. We recommend using the session-specific workshop observation checklist, Workshop Fidelity Checklist, and the accompanying document Workshop Fidelity Checklist Instructions...

Other Fidelity Activities: Because Leader or Master Trainer selection is very important to the success of the program, we urge organizations take the time to clarify the CDSME expectations are with training candidates, and if possible, to meet and “interview” candidates prior to training. The Stanford Fidelity Toolkit has a script and interview questions for talking with potential candidates, as well as other tools that outline Leader guidelines and expectations. It is important that both Leaders and Master Trainers and the organizations they represent, understand the training time commitment and the expectations for the number workshops and/or leader trainings.